

**REQUEST FOR PROPOSALS  
FOR A STATISTICAL VALUATION PROGRAM  
FOR THE ASSESSOR'S OFFICE IN  
THE TOWN OF EAST WINDSOR, CONNECTICUT**

The Town is undertaking a program to revalue all Real Property, effective October 1, 2023. Contractors interested in providing the Valuation Services set forth in the attached Specifications are invited to deliver 3 (three) copies of the proposals to the **Town of East Windsor's Office of the First Selectman, 11 Rye St. Broad Brook, CT 06016, no later than 4:00 p.m., February 17, 2023.** **Proposals will be opened and read at 11:00a.m. on February 21, 2023.** **Contract will be awarded no later than February 24, 2023.**

All proposals shall be sealed, addressed to the **Office of the First Selectman, 11 Rye St. Broad Brook, CT 06016** and marked: **"Town of East Windsor, Connecticut Proposals for OCTOBER 1, 2023 Statistical Valuation Services"**.

All information pertaining to the Contractor's technical and management approach to completing this project, as well as the proposed cost, timetable, and staffing plan, shall be presented in the proposal. The proposal must address, at a minimum, each of the issues set forth in the Request for Proposals as well as any addendums in order to be considered responsive. Any proposal that does not respond to each issue in the Request for Proposals may be rejected by the Town as non-responsive.

The Town reserves the right to amend this proposal for the Valuation Program for equitable assessments at any time prior to the deadline for submission of proposals and to reject any or all proposals received if they determine it to be in the best interests of the Town. The Town will be licensed to utilize the *Appraisal Vision*® CAMA Software V8 of Vision Government Solutions of Northborough, Massachusetts as of August 2021 and is not looking to change systems at this time. All data entry must be done off-site and transferred to the in-house computer system. The system must be fully loaded with all assessment data before the revaluation is completed. Any proposal must address costs associated with utilizing the Town's current CAMA system. All data entry will be the responsibility of the Contractor. The contractor will be responsible for all costs associated with providing data available via the Web so that taxpayers can log in and review properties on-line. Data entry includes Income and Expense information from the forms for the most current year available.

In addition to addressing each of the items in the specifications, the Contractor must submit, as part of its proposal, the following information:

1. A Letter of Transmittal signed by the individual authorized to negotiate for and contractually bind the Contractor stating that the offer is effective for at least sixty (60) Calendar Days from the deadline for the submission of proposals.
2. A list of Connecticut Municipalities for which the Contractor has completed Valuation Programs for the last five years, and contacts.
3. A list of Connecticut Revaluation Contracts for which the Contractor is currently committed with timetable for completion.
4. A listing of Connecticut Municipalities now using the Contractor's CAMA Software, most current version.
5. Description and examples of the Contractor's revaluation public relations program.

6. Copy of Contractor's current Connecticut Revaluation Certificate issued pursuant to Connecticut General Statutes 12-2c.
7. A bid bond or certified check in the amount of 10% of this bid must be submitted by the bidder with his bid as a guarantee that, in case the contract is awarded to him, he will, within ten days after appropriation of funds and notice of award, execute such contract, and furnish a satisfactory Performance Bond and Payment Bond, for approval by the Town of East Windsor.
8. Project Timetable:

The CONTRACTOR must submit a work plan that addresses the major tasks that must be performed for the successful completion of the revaluation program. This work plan must adhere to the deadlines that have been established. The CONTRACTOR must identify the starting dates of each task and the resources (man-hours) that will be allocated for each work activity. The ASSESSOR must agree upon the work plan time schedule. Any proposal which cannot meet the project schedule will be rejected.

#### Completion Date and Time Schedule

1. Awarding of Contract

The town will award the contract for the reappraisal and revaluation project no earlier than **February 21, 2023**. The TOWN reserves the right to reject any and all proposals as previously stated.

2. Changes and Subletting of Contract

- a. Changes

Changes in these specifications to the contract will be permitted only upon written mutual agreement of the CONTRACTOR and the TOWN.

- b. Subletting

The CONTRACTOR shall not assign, transfer, or sublet the contract or any interest or part therein without first receiving written approval from the TOWN and the bonding company. It should be mutually agreed and understood that said consent by the TOWN shall in no way release the CONTRACTOR from any responsibility or liability as covered in these specifications and contract.

#### Method for determination of best price.

The best price shall be the lowest price from a bidder who meets the minimum criteria of the specification and provides the highest level of performance (see Evaluation Criteria). The Town of East Windsor reserves the right to reject any and all bids. Bids which are irregular in form, incomplete, conditioned, or qualified may be disregarded and rejected as improper except that the Town may waive any defects or irregularities. All bids are subject to appropriation by the Town of East Windsor.

## Evaluation Criteria

Proposals will be evaluated using comparative criteria set forth as follows:

The Town will review and rank each technical proposal that is deemed responsive to this RFP. When this process is complete, the Town will take into consideration the total cost associated with each proposal. The Town reserves the right to select the Contractor who in its opinion best meets the needs of the Town. This is procurement for professional services and therefore weighted factors such as Price, Experience, Proposal and working knowledge of our CAMA System (Vision) will go into determining the most responsive proposal.

# CONTRACT SPECIFICATIONS FOR VALUATION SERVICES

## **1 DEFINITIONS**

**ASSESSOR:** The word “Assessor” shall mean the duly appointed Assessor of East Windsor, Connecticut.

**PROJECT:** The word “PROJECT” shall mean the valuation of all real property within the corporate limits of East Windsor, Connecticut for assessment purposes.

**CONTRACTOR:** The word “CONTRACTOR” shall mean the certified revaluation company who shall perform this project.

**TOWN:** The word “TOWN” shall hereinafter mean The Town of East Windsor, Connecticut.

## **SCOPE OF VALUATION PROGRAM**

This Project includes the complete valuation of all real property within the corporate limits of East Windsor, Connecticut effective as of October 1, 2023.

CONTRACTOR shall furnish all the databases, labor, materials, supplies and equipment and perform all work for the project in strict accordance with the hereinafter-listed specifications.

All work will be carried out and all forms, materials, and supplies utilized in this project shall conform to and be carried out in accordance with the requirements of the Secretary, Office of Policy and Management, the Connecticut General Statutes, and Regulations of Connecticut State Agencies pertaining hereto, and shall be subject to the direct supervision and approval of the ASSESSOR of the TOWN OF EAST WINDSOR.

The values to be determined shall be the present true and actual value of each parcel of real property as that term is used in Title 12 of the Connecticut General Statutes and shall be based upon recognized methods of appraisal and conform to Uniform Standards of Professional Appraisal Practices, as required by Connecticut General Statutes for the licensing and certification of all individuals involved in the appraisal of real estate.

The Project will cover and include all real property in East Windsor including the following categories:

1. All taxable real estate, land, buildings, and improvements.
2. All tax-exempt real estate, land, buildings, and improvements.
3. All public utility and buildings.

**2.1 EFFECTIVE DATE:** The effective date of this project shall be for the October 1, 2023 Grand List and the pricing and valuation by CONTRACTOR of all land, buildings and property under this CONTRACT shall reflect the present true and actual value as of October 1, 2023.

**2.2** PARCEL COUNT:

CONTRACTOR’s price for the revaluation is based upon the following anticipated parcel counts (estimated by TOWN as of October 1, 2022.)

Residential Dwellings	4075
Residential Condominiums	800
Residential Vacant Land (250 + 220 under PA490)	422
Commercial Buildings	235
Apartments	21
Industrial Buildings	80
C&I Vacant Land	85
Exempt Improved	55
Exempt Vacant	95
TOTAL PARCEL COUNT ESTIMATE	5030

**2.3** TOWN DATA

Current Basis of Assessment	70%
Taxable Grand List as of October 1, 2020	\$ 818,173,724
Date of Last Revaluation	October 1, 2017
Estimated Population	11,668
Area of the Town	26.3 sq miles

**PROPOSAL FORM FOR 2023 VALUATION**

THE VALUATION OF ALL REAL PROPERTY  
(TAXABLE AND EXEMPT), LOCATED WITHIN  
THE CORPORATE LIMITS OF THE TOWN OF EAST WINDSOR, CONNECTICUT,  
EFFECTIVE OCTOBER 1, 2023.

The undersigned Proposer affirms and declares:

1. That this PROPOSAL is executed by said Proposer with full knowledge and acceptance of the CONTRACT (including the Reappraisal Specifications) enclosed with the REQUEST FOR PROPOSALS on the subject project.
2. That should this PROPOSAL be accepted in writing by the First Selectman of the Town of East Windsor, Connecticut, said Proposer will furnish the services for which this PROPOSAL is submitted at the price bid and in compliance with the provisions of said CONTRACT.

3. That this PROPOSAL is accompanied by surety in the form and amount indicated below:

_____ Bid Proposal Bond	Amount \$ _____
_____ Certified Check	Amount \$ _____

4. That the Proposer or his or her representative has visited the Town of East Windsor; is familiar with its geography, general character of houses and its commercial and industrial areas; has examined the quality and condition of the ASSESSOR'S records; verified the parcel counts and has met with the ASSESSOR to make himself or herself knowledgeable of those matters and conditions in the TOWN which would influence this bid proposal.
5. That all items, documents, and information required to accompany this PROPOSAL of the aforesaid CONTRACT are enclosed herewith.
6. That the Proposer proposes to furnish the services and materials required to complete the subject project in accordance with the aforesaid CONTRACT for the following amount:

Proposal Requirement	\$ _____
Alternate #1	\$ _____

7. Proposed scheduled prices for aforementioned proposals are valid for ninety (90) days.

8. That the Proposer understands and accepts that, although the proposed price is a major factor for consideration, the TOWN reserves the right to award the contract to other than the low-cost Proposer after an analysis of the additional factors outlined in the aforesaid CONTRACT.

FIRM NAME OF  
PROPOSER: \_\_\_\_\_

BY:  
SIGNATURE: \_\_\_\_\_

TYPE NAME: \_\_\_\_\_

TITLE: \_\_\_\_\_

### **3 GENERAL CONDITIONS**

#### **3.1 STATE CERTIFICATION**

The CONTRACTOR must hold from the time of submission of the proposal through the completion of all work hereinafter required, a valid Connecticut Revaluation Company Certification pursuant to Section 12-2c of the Connecticut General Statutes.

#### **3.2 PERSONNEL**

CONTRACTOR shall provide experienced and qualified personnel in compliance with the requirements for the Equal Employment Opportunity provisions of Federal and State governments. CONTRACTOR shall submit to the TOWN, written qualifications of all personnel assigned to this project.

All personnel assigned to this project shall be subject to the approval of the ASSESSOR, prior to the commencement of the individual's duties in the TOWN and shall be caused to be removed from the project by CONTRACTOR upon written notification of the ASSESSOR.

##### **3.2.1 Minimal Qualifications:**

###### **3.2.1.a Project Manager or Supervisor:**

The administration of this project shall be assigned by CONTRACTOR to a project manager or supervisor, who shall be certified by the State of Connecticut as a Revaluation Supervisor pursuant to Section 12-2c of the Connecticut General Statutes, and such other statutes and regulations that the State of Connecticut may promulgate from time to time, and shall have not less than three (3) years of practical appraisal management experience in the appraisal of commercial, industrial, apartment, and residential type properties. The project manager or supervisor shall be subject to approval by the ASSESSOR.

##### **3.2.1.b Reviewers and Appraisers:**

Reviewers and appraisers shall be certified under the Connecticut Revaluation Certification Program pursuant to Section 12-2c of the Connecticut General Statutes, and such other statutes and regulations that the State of Connecticut may promulgate from time to time and shall not have less than three (3) years of practical appraisal experience in the appraisal of the particular type of properties for which they are responsible. Two (2) years of this experience shall have been in the mass appraisal field and shall have occurred within the past five (5) years. All reviewers and appraisers shall be subject to the approval of the ASSESSOR prior to the commencement of their duties on this project.

###### **3.2.1.c Background Check:**

All personnel will be subject to background checks.

##### **3.2.2 Identification**

All field personnel shall have visible clip-on identification cards, which shall include an up-to-date photograph, supplied by CONTRACTOR and signed by the TOWN'S Assessor. In addition, all field personnel shall carry a "Letter of Introduction" signed by the ASSESSOR. All automobiles used by field personnel shall be registered with the TOWN's Police Department giving license number, make, model, year and color of all vehicles used on this Project.

### 3.2.3 Office Hours and Staffing:

CONTRACTOR shall maintain a local office as needed, from the commencement of work on this project through the conclusion of the public hearings. When not on site, staff will be available by telephone and/or email and text.

### 3.2.4 Conflict of Interest

No resident of the TOWN or TOWN employee shall be employed by CONTRACTOR, except in a clerical capacity Town, without the prior approval of the ASSESSOR and the FIRST SELECTMAN.

## 3.3 PROTECTION OF THE TOWN

### 3.3.1 Bonding

CONTRACTOR shall, to secure the faithful performance by CONTRACTOR of the terms of this CONTRACT, furnish to the TOWN a Performance Surety Bond in the amount of this contract, which bond shall be issued by a bonding company licensed to do such business in the State of Connecticut, with a minimum. Best Company rating of "A/VII." Said bond shall be delivered to the TOWN prior to the commencement of actual work and shall be in a form satisfactory to and approved by the TOWN 'S attorney. It is understood and agreed that upon completion and delivery to the Town of the revaluation and its approval by the ASSESSOR and after completion of the duties of the Board of Assessment Appeals, the performance bond shall be reduced to 10% of the value of the contract for the purpose of covering the defense of all appeals taken by taxpayers. The reduced amount of the bond shall remain effective until a final resolution in the courts of any timely appeals taken from the doings of the Board of Assessment Appeals on the list of October 1, 2023.

### 3.3.2 Insurance

CONTRACTOR shall, at its own expense, provide and keep in force:

#### 3.3.2.a Workers' Compensation insurance in the required amount, and Employers' Liability insurance in the following amounts:

Bodily injury by accident- \$100,000 each accident.

Bodily injury by disease- \$500,000 each accident and,

Bodily injury by disease- \$100,000 each employee.

The policy must provide coverage for benefits payable under the Connecticut Workers Compensation Act and include the Voluntary Compensation endorsement.

#### 3.3.2.b Appraiser's Professional Liability insurance providing errors and omissions coverage for professional services rendered as an appraiser. The minimum limit of liability shall be \$1,000,000 per claim, subject to a \$2,000,000 aggregate.

Any deductible applicable to a claim must be noted on the Certificate of Insurance. If the policy is written on a claim made policy form, CONTRACTOR must maintain the insurance for a period of two years from the completion of the contract.

3.3.2.c During the term of the contract, CONTRACTOR shall provide Public Liability insurance for bodily injury and property damage. The Public Liability insurance shall be written on a comprehensive form and include, without limitation, coverage for premises and operations, completed operations, independent contractors, broad form property damage, blanket contractual and personal injury. The required limits of liability are:

- \$2,000,000- General Aggregate
- \$2,000,000- Product-Completed Operations Aggregate
- \$1,000,000- Personal and Advertising Injury
- \$1,000,000- Each Occurrence
- \$ 50,000- Fire Damage/Fire
- \$ 5,000- Medical Expense/Person

3.3.2.d Automobile Liability insurance shall be written with a Comprehensive Form and include coverage for owned, hired, and non-owned vehicles. The limit for any one accident or loss shall be \$1,000,000.

3.3.2.e Insurance Certification: An Insurance certificate shall be required to be filed with the TOWN, certifying coverage and limits of automobile, bodily injury liability, property damage liability and Worker's Compensation. The TOWN to be named as Additional Insured on the Insurance coverage named herein for the claims arising out of the COMPANY'S performance of the contract herein.

3.3.2.f Patent/Copyright Liability: CONTRACTOR shall save the TOWN harmless from any liability of any nature or kind, including costs and expenses for, or on account of, any patented or copyrighted equipment, materials, articles, or processes used in the performance of this contract. The TOWN must be named as an Additional Insured on the policy.

3.3.2.g Defense of TOWN: All insurance companies shall have the duty to defend the TOWN against liability or property damage claims arising from the conduct of CONTRACTOR and/or agents or employees.

### 3.3.3 Penalties

3.3.3.a Failure by CONTRACTOR to complete all work prior to the date specified herein, December 30, 2023, shall be cause for a penalty payment by CONTRACTOR, on request of the ASSESSOR, in the amount of FIVE HUNDRED DOLLARS (\$500.00) per day beyond the specified date of completion. For the purposes of this penalty only, completion of all work no later than December 30, 2023 is defined as follows:

- 3.3.3.a.1 Completed property record cards with all pricing, review and final valuations.
- 3.3.3.a.2 Completed Digital Imaging (if required).

3.3.3.a.3 Final Assessment notices addressed and in envelopes prepared for mailing.

3.3.3.b Penalties due under this clause shall be deducted from the contract price and will represent a fair and equitable estimate of the damages the TOWN will suffer if CONTRACTOR'S work is not completed by December 30, 2023. The TOWN shall have the right to use the funds withheld from each periodic payment to these CONTRACT SPECIFICATIONS to satisfy in whole or in part, this penalty clause. Delays occasioned by strike, explosion or acts of God or an order of court or other public authority are excepted.

3.3.3.c Bankruptcy, Receivership, Insolvency:

If CONTRACTOR, with the result that it does not pay its debts as they become due, or if a receiver shall be appointed for its business or its assets and not voided within 60 days, or if interest herein shall be sold under execution or if it shall be adjudicated insolvent or bankrupt, then and forthwith thereafter, the TOWN shall have the right, at its option and without prejudice to its rights hereunder, to terminate the contract.

3.3.3.d Termination:

If either party fails to fulfill in a timely and satisfactory manner their obligations under this agreement, or shall violate any of the covenants, conditions or stipulations of this agreement, which failure or violation shall continue for 30 days after written notice of said failure or violation is received by the offending party, unless the correction of such failure inherently requires a longer period of time and provided further that the applicable party is proceeding diligently to correct the failure, then the opposing party shall thereupon have the right to terminate this agreement by giving written notice to the offending party of such termination and specify the effective date thereof, at least seven (7) days before the effective date of such termination.

In the event of termination, all finished work and documentation, complete and incomplete, shall, at the option of the ASSESSOR, be delivered to them. CONTRACTOR shall be entitled to the release of the performance bond and to receive just and equitable compensation for any work performed under this agreement completed prior to the date of termination. Notwithstanding the above, in the event of termination, neither party shall be relieved of liability by virtue of its breach of this agreement.

3.3.3.e Hold Harmless Agreement: CONTRACTOR shall, at all times, defend, indemnify, protect and save harmless, the TOWN and its officers, agents, and employees from any and all claims or demands for damage for bodily injury, including death or property damages sustained by any party, including officers, agents, and employees of CONTRACTOR. Said hold harmless clause shall include, but not limited to investigation, defense and settlement or payment or judgment of any liabilities.

- 3.3.3.f Severability: In the event any part of any clause or provision of this contract or contract specifications are judicially determined to be unenforceable, it shall be deemed severable from the remainder of that clause or provision and such remainder shall be binding upon the parties to this contract.
- 3.3.3.g Waiver: No action or failure to act by the TOWN shall constitute a waiver of any right or duty afforded it under the contract or contract specifications.
- 3.3.3.h Misrepresentation or Default: The TOWN may void this agreement if CONTRACTOR has misrepresented any offering or defaults on any contract with a Connecticut municipality. CONTRACTOR shall, also, immediately notify the TOWN of any claim or case formally brought against CONTRACTOR.

### **3.4 CHANGES AND SUBLETTING OF CONTRACT**

#### **3.4.1 Changes**

Changes in these specifications or to the contract will be permitted only upon written mutual agreement of CONTRACTOR and the TOWN.

#### **3.4.2 Subletting**

CONTRACTOR shall not assign, transfer, or sublet the contract or any interest or part therein, without first receiving written approval from the TOWN. It should be mutually agreed and understood that said consent by the TOWN shall in no way release CONTRACTOR from any responsibility or liability as covered in these specifications and contract.

### **3.5 COMPLETION DATE AND TIME SCHEDULE**

Signing of Contract: Within 30 days after receipt of notice of acceptance by the TOWN of its bid, as possibly revised by negotiations, CONTRACTOR shall execute with the TOWN a contract in the form agreeable to the TOWN and incorporating these contract specifications.

Contractor shall commence the valuation work not later than two weeks after contract signing, and shall continue uninterruptedly in a diligent fashion so as to ensure completion within the schedule of completion dates hereinafter set forth below:

#### **3.5.1 Completion Dates**

The following phases of the PROJECT must be completed in accordance with the following schedule. Failure to substantially complete the stated performance by the stated dates shall constitute a material breach of this Contract:

- 3.5.1.a Data Collection completed by August 30, 2023.
- 3.5.1.b Complete and deliver to the Assessor residential data verification by September 15, 2023.

- 3.5.1.c Complete and deliver to the Assessor commercial, industrial, public utility, and tax-exempt valuation by September 1, 2023
- 3.5.1.d Complete and deliver to the Assessor land study and values set by September 1, 2023.
- 3.5.1.e Complete and deliver building cost manual by October 1, 2023.
- 3.5.1.f Complete and deliver to the Assessor study of market rents, expenses, and capitalization factors & submission of preliminary Performance Testing Standards by October 15, 2023.
- 3.5.1.g Deliver completed CAMA database with digital images, property record cards with all measurements, listings, sketches, pricing, and suggested values to the ASSESSOR according to the following schedule:
- 3.5.1.h ASSESSOR completes review and final adjustments made for real property no later than November 5, 2023.
- 3.5.1.i Assessment change notices mailed to comply with requirements of Connecticut State Statutes, Section 12-62(f) by November 15, 2023. (CONTRACTOR to pay postage)
- 3.5.1.j Informal hearings to begin no later than November 23, 2023 and end no later than December 20, 2023.
- 3.5.1.k Notices of results of informal hearings completed shall be completed on forms approved by the Assessor and mailed out (CONTRACTOR to pay postage), computer filed, and final property record cards printed and delivered to the ASSESSOR in alphabetical street order no later than December 30, 2023.
- 3.5.1.l Submission of final Performance Testing Standards no later than December 30, 2023.

### 3.5.2 Assessment Date

The completed appraisals, upon approval of the ASSESSOR, will serve as the basis for assessments effective on the Grand List of October 1, 2023.

- a. In the event that the State of Connecticut takes any action, the result of which is that the Town's duty to conduct a revaluation for the October 1, 2023 Grand List is suspended, postponed, waived or changed in any material respect, the Town May, at its option: 1) cancel the revaluation and revoke, rescind or nullify the bid award; and any contract resulting therefrom; or 2) modify the bid award or contract arising therefrom on such terms and conditions as Contractor and the Town may mutually agree.
- b. In the event that the ASSESSOR and the CONTRACTOR agree to earlier completion dates on any of the above items, appropriate adjustments to completion dates will be made to the remaining items.

### 3.5.3 Delays:

CONTRACTOR shall not be liable for delays caused by reasons of war, strike, explosion, acts of God, order of court or other public authority.

### 3.6 PAYMENT SCHEDULE

#### 3.6.1 Periodic Payments

Payments shall be made in the following manner:

Thirty (30) days after the execution date of this contract, and at the end of each thirty (30) day period thereafter for the term of this contract, CONTRACTOR will certify in writing to the ASSESSOR the percentage of the total work completed under the contract which CONTRACTOR has performed during the said thirty (30) day period. Such notification will itemize and accurately indicate the extent and nature of work performed by volume, street, and category or in any manner as required by the ASSESSOR. The itemization shall be categorized by each of the “Stages of Completion” listed on the Payment Schedule as shown below.

The TOWN , upon determination by the ASSESSOR that the certification of CONTRACTOR concerning work during said period is accurate, will pay to CONTRACTOR a percentage of the total compensation due under the contract equal to the percentage of work certified as having been completed during said period, less ten percent (10%), which is to be retained by the TOWN for payment to CONTRACTOR at such time that he or she has performed fully and satisfactorily all its obligations, requirements, and litigation under the contract. The retained ten (10%) percent of the contract price is to be paid upon the completion of work of the Board of Assessment Appeals on the October 1, 2023 Grand List in accordance with provisions of Section 3.3.3b of this contract.

This contract makes provisions for a reduction of the performance bond to 10% of the contract price so as to ensure the defense of any appeals resulting from the valuation work.

#### 3.6.2 Stages of Completion

<b>CODE</b>	<b>TASK</b>	<b>%</b>	<b>AMOUNT</b>
100	Bonding, office set-up, project setup, CAMA Conversion, Software Installation, training, public relations		
200	Data Collection, quality control, data entry		
300	Residential valuation		
400	Commercial/Industrial Valuation		
500	Residential field review, data entry		
600	Commercial/Industrial field review, income production, reconcile cost and income		
700	Digital imaging, documentation		
800	Impact notices, residential and commercial/industrial hearings, field work, data entry		

900/ 1000	Project finalization, change notices, special land pricing, client meetings, support of values, goodwill		
<b>TOTALS:</b>		<b>100</b>	

#### **4 RESPONSIBILITIES OF CONTRACTOR**

##### **4.1** GOOD FAITH

CONTRACTOR shall, in good faith use, its best efforts to assist the ASSESSOR in determining the present true and actual valuations of all real property situated in the TOWN, and shall not undervalue or overvalue any land, building or other property to avoid or minimize its responsibilities specified herein.

##### **4.2** PUBLIC RELATIONS

The parties of this valuation project recognize that a good public relations program is required in order that the public of the TOWN may be informed as to the purpose, benefits and procedures of the valuation program.

CONTRACTOR shall provide reasonable assistance to the ASSESSOR in conducting a program of public information through the press and other media, such as meeting with citizens, service clubs and property owner groups as a means of establishing understanding and support for the valuation program and sound assessment administration. CONTRACTOR shall supply visual aids and other media at its disposal to this end. All public releases shall be approved by the ASSESSOR prior to release.

##### **4.3** CONDUCT OF COMPANY EMPLOYEES

As a condition of this contract, CONTRACTOR'S employees shall, at all times, treat the residents, employees and taxpayers of the TOWN with respect and courtesy; CONTRACTOR shall take appropriate and meaningful disciplinary measures against those who violate the terms of this provision. A suitable dress code for all employees will also be implemented.

##### **4.4** RECORDS

###### **4.4.1** General Provisions

CONTRACTOR shall provide all record cards, street cards, owner cards, supplies, equipment, forms, literature, notices, and papers to be used in this project at no additional cost to the TOWN.

###### **4.4.2** Records are TOWN Property

The original or a copy of all records and computations, including machine readable databases, made by CONTRACTOR in connection with any appraisal of property in the TOWN shall, at all times, be the property of the TOWN and, upon completion of the project or termination of this contract by the TOWN, shall be left in good order in the custody of the ASSESSOR. Such records and computations shall include, but not be limited to:

###### 4.4.2.a Assessor's Maps

- 4.4.2.b Land Value Maps
- 4.4.2.c Computations of land and/or building values
- 4.4.2.d All letters of memoranda to individuals or groups explaining methods used for appraisals
- 4.4.2.e Operating statement of income properties
- 4.4.2.f Duplicated notice of valuation changes
- 4.4.2.g Database of all property records, CAMA system, and integration with administrative system.
- 4.4.2.h In addition, throughout the conduct of said revaluation, any criteria, guidelines, price schedules or statement of procedures used in such revaluation by the Contractor shall be available by contractor for public inspection in the Assessor's office and shall be available thereafter, all in accordance with Section 12-62 (c) of the Connecticut General Statutes.

#### 4.4.3 ASSESSOR'S Records

CONTRACTOR shall use a system approved by the ASSESSOR for the accurate accounting of all records and maps, which may be taken from the ASSESSOR'S office in conjunction with this project. All such records and maps shall be returned immediately following their use. None of the ASSESSOR'S records shall be taken outside the corporate limits of the TOWN without prior written permission of the ASSESSOR.

The ASSESSOR will permit CONTRACTOR to copy all residential building sketches from existing field cards, together with the outside dimensions of all auxiliary buildings such as garages, barns, sheds, and swimming pools. CONTRACTOR will be permitted to copy and sketch all commercial and industrial properties, which are presently outlined on existing ASSESSOR's field cards.

#### 4.4.4 Property Record Cards (Street Cards)

CONTRACTOR shall complete and file by STREET order, Property Record Cards, commonly referred to as "Street Cards" or "Field Cards". These cards shall contain all manner of information affecting value, including but not limited to, information as to location of property, classification as to usage, owner of record, source of title, size, shape and physical characteristics of land, with the breakdown of front feet, square feet or acreage as applicable, along with the unit of value applicable to each, public utilities available, public improvements, census tract number, zoning regulations in effect as of the assessment date. All physical improvements shall be listed giving all interior and exterior construction details, quality of construction, age, condition, replacement values, percent of physical, functional, and economic depreciation, depreciated values, fair market value and 70% assessment value will be shown. A computer-generated sketch of all buildings, with the appropriate scale of such sketch, shall also be shown on these cards. The "Street Cards" or "Field Cards" will contain a digitized photo of each house.

### 4.5 ASSESSMENT NOTICES

At the close of the PROJECT, a notice shall be sent, at CONTRACTOR'S expense by first class mail, to each property owner of record, setting forth the valuation that has been placed upon the property identified in the notice, prepared on a form approved by the ASSESSOR. CONTRACTOR will provide the needed information for the notice. Also enclosed with such notice shall be information specifying the dates, times and places of the informal public hearings and information describing the property owner's right to appeal the valuation of his property, including the manner in which an appeal may be filed with the Board of Assessment Appeals. Such notices shall be subject to approval by the ASSESSOR in accordance with Connecticut General Statutes.

The contractor will be responsible for all costs associated with providing data available via the Web so that taxpayers can log in and review properties on-line.

#### **4.6 INFORMAL PUBLIC HEARINGS**

At a time mutually agreeable to the ASSESSOR and CONTRACTOR and following completion of all review work by the ASSESSOR and CONTRACTOR, CONTRACTOR shall hold public hearings so that owners of property or their legal representative may appear at specified times to discuss, with qualified members of CONTRACTOR'S staff, the valuations of their property. CONTRACTOR'S personnel shall explain the manner and methods of arriving at value. Informal public hearings, at the ASSESSOR's discretion, may be held on weeknights and Saturdays.

CONTRACTOR, in conjunction with recommendations of the ASSESSOR, shall schedule a sufficient number of hearings and provide sufficient personnel to handle said hearings expeditiously and fairly. Any information offered by the taxpayer or their legal representative shall be given consideration, and an adjustment shall be made where warranted. The public hearings shall be completed by December 20, 2023.

CONTRACTOR shall keep a record, on a form approved by the ASSESSOR, of all owners that requested a hearing and the result of that hearing. A copy of those records shall be given to the ASSESSOR.

CONTRACTOR shall be responsible for sending notice, by First Class mail at CONTRACTOR'S expense, to each taxpayer or his or her legal representative who appears at these hearings seeking review of valuation. Such notice shall include the original valuation determined by CONTRACTOR and any adjusted valuation as deemed appropriate based on any information received at such hearing, or a statement that no change is warranted. Such notice shall be subject to approval by the ASSESSOR and shall contain information describing the property owner's rights to appeal the valuation, including the manner in which an appeal may be filed with the Board of Assessment Appeals.

#### **4.7 BOARD OF ASSESSMENT APPEALS**

CONTRACTOR shall have a qualified member or members, approved by the ASSESSOR, of its staff, available for attendance at any necessary deliberations of the Board of Assessment Appeals held after the completion of the revaluation, Sundays excluded, but such availability and attendance shall not be required after the date for the completion of the duties of the Board of Assessment Appeals on the October 1, 2023 Grand List or for one complete calendar year beyond completion of the revaluation, whichever comes first, to assist in the settlement of complaints and to explain the valuations made.

## **4.8** LITIGATION

In the event of appeal to the courts, CONTRACTOR shall furnish a competent witness or witnesses, approved by the ASSESSOR, to defend the valuation of the properties appraised. It is understood that CONTRACTOR shall furnish said witness or witnesses on any court action instituted on the October 1, 2023 Grand List assessments at no charge. CONTRACTOR shall provide supporting data, including written appraisal if deemed necessary by the ASSESSOR, for any said court appeals. CONTRACTOR shall also comply with any request by the TOWN to answer any interrogatories, provide witnesses for depositions or to otherwise participate in the discovery process pertaining to any litigation described herein. CONTRACTOR shall not be held responsible for any assessment changed from the original valuation figure by parties other than CONTRACTOR.

## **4.9** INFORMATION

### **4.9.1** Information to TOWN

CONTRACTOR shall give to the ASSESSOR any and all information requested pertaining to the project for a period of one (1) year after completion of the duties of the Board of Assessment Appeals on the October 1, 2023 Grand List, without any additional cost to the TOWN.

## **5** VALUATION APPROACHES

All values used in the revaluation project must be developed in compliance with nationally recognized professional mass appraisal standards, including Standard 6 of the Uniform Standards of Professional Appraisal Practice (USPAP) as published by the Appraisal Standards Board. Any proposed modifications to the valuation schedules must be reviewed and analyzed with the ASSESSOR prior to generating the proposed values for field review.

## **5.1** MARKET APPROACH

The CONTRACTOR must describe in detail its particular methods for generating values with the market approach. Every parcel of real property should be valued by the market approach, with the exception of special use properties. The Comparative Sales Approach or a Statistical Modeling Approach is the two preferred techniques. If a statistical modeling approach is employed, the CONTRACTOR must specify the techniques employed and the types of property that will be valued with these techniques. If the direct sales comparison method is employed, the CONTRACTOR in its proposal must describe all adjustment techniques.

### **5.1.1** Sales Verification

The validity of all residential sales in the TOWN for the period of June 1, 2022 through October 1, 2023, shall be determined by the CONTRACTOR and the ASSESSOR. For vacant land, commercial/industrial, and special residential properties (i.e., waterfront) the CONTRACTOR and the ASSESSOR will validate sales for the period of January 2, 2022 through October 1, 2023.

The town will be verifying sales by mailing a sales questionnaire to the owners of the properties that have transferred in the above time frame. These forms will be made

available to the contractor as they are returned on a monthly basis or a schedule that is mutually agreeable to the contractor and the assessor if a change is necessary.

The CONTRACTOR will complete an interior and exterior inspection and measurement check of all sale properties to determine the correctness of the current physical listing at the time of the sale. These validated sales will be the basis for the comparable sales approach for all classes of property.

Where comparable sales are not available from within the Town of East Windsor, the CONTRACTOR should collect and verify sales information for income producing properties, vacant land, and unique residential properties from comparable municipalities. This sales information will be used to support and defend the valuation of properties for which insufficient sales information within the Town of East Windsor exists.

## **5.2 COST APPROACH AND ANALYSIS**

The CONTRACTOR shall derive a value for real property by estimating the current cost to replace or reproduce the existing structure, deducting for all accrued depreciation in the property, and adding the estimated land value. The CONTRACTOR shall develop cost schedules based on current costs of labor and materials prevailing in the TOWN during the year immediately preceding October 1, 2023 valuation date. Documentation supporting the determination of the cost schedule to be utilized in the revaluation must be submitted and approved by the ASSESSOR.

The CONTRACTOR must market calibrate for the TOWN the replacement cost approach employed for the appropriate classes of property. All forms of depreciation (physical, functional, and economic) must be analyzed for the types of properties located in the TOWN. Physical depreciation must be determined by estimating the effective age of each property. Any additional adjustments for functional or economic obsolescence must then be made.

In calibrating accrued depreciation to local market conditions, and in estimating accrued depreciation, a report of the sales used in this determination, and the adjustments that were derived must be submitted to the ASSESSOR for approval.

The CONTRACTOR shall develop and separately explain each depreciation amount listed on the property record card. Land values shall be added to the depreciated improvement values. The value determined as the depreciated replacement cost of each property shall be compared with the values determined by the income or sales comparison approaches to assist in the determination of obsolescence for property types and locations.

Depreciation schedules or methods to be used in determining the amount of depreciation shall reflect the normal and accepted depreciation rates of buildings according to classification. These schedules or methods shall cover residential, commercial, industrial, farm and special use buildings, and must be approved by the ASSESSOR. Cost schedules must be supported by a recognized valuation publication company such as Marshall & Swift, Means, etc.

## **5.3 INCOME APPROACH**

The CONTRACTOR shall determine a value for income-producing property by converting anticipated income into a property value. The CONTRACTOR shall either capitalize a single year's income expectancies at a market-derived capitalization rate or a capitalization rate that reflects a specified income pattern, return on investment, and change in the value of investment,

or discount the annual cash flows for the holding period and the reversion at a specified yield rate.

Typical income and expense ratios shall be developed by the CONTRACTOR by property type and shall be approved by the ASSESSOR. Residential multi-family properties containing up to 6 units shall be valued using the gross rent multiplier (GRM) in accordance with §12-63b. The CONTRACTOR may utilize information contained in the income and expense statements obtained by the Assessor's Office to assist in their analysis.

#### **5.4** LAND VALUATION

The land values will be derived from market sales occurring over at least the 2-year period prior to October 1, 2023, land residual analysis, and/or the extraction method. The land values will be set by the CONTRACTOR and approved by the ASSESSOR. In the event any disagreement between the ASSESSOR and the CONTRACTOR, the ASSESSOR shall have the final decision confirming all land values and methods. When applicable, both the full value and the P.A. 490 value shall be calculated by the CONTRACTOR. The PA490 value will be based on the most current schedule recommended by the Secretary of the Office of Policy and Management of the State of Connecticut per CGS 12-2b.

A complete land appraisal schedule must be developed for application to all types of land. Market derived adjustments must be developed for all factors influencing land value including size, location (including proximity to water), zoning and the presence of wetland conditions, topography, soil conditions, utilities, utility easements and power lines, non-conforming uses, vacancy, form of ownership, and zoning variances. Inspectors must visually inspect both improved and unimproved parcels to determine the affect of these conditions will have on the overall value of each parcel. Determination of these factors must be recorded in the inspector's notes at the time of inspection.

For areas where there are insufficient land sales, land value must be extracted from the sale price of improved properties, by deducting the depreciated cost of the improvement from the total sale price.

The CONTRACTOR shall prepare land unit values by front foot, square foot, acreage or fractional acreage; whichever in the judgment of the CONTRACTOR and ASSESSOR most accurately reflects the market for the appraised land.

The CONTRACTOR shall delineate the land value units on all streets and acreage in the Town of East Windsor on a suitable map to be provided by the TOWN. The land value map shall be returned to the TOWN prior to completion of the project.

The CONTRACTOR shall prepare a written report summarizing its findings with respect to the values of the various categories of land, together with supporting statistical documentation in the form of comparable sales within an acceptable time period. Where comparable sales are not available from within the Town, the CONTRACTOR shall use comparable sales from surrounding municipalities with the approval of the ASSESSOR.

#### **5.5** NEIGHBORHOOD DELINEATION

After considering the environmental, economic, social characteristics of the Town, the CONTRACTOR shall, with the cooperation and approval of the ASSESSOR, delineate

“neighborhood” units within the Town. These neighborhoods will be determined by analysis of the market factors needed to select comparable sales for the sales approach to value. The CONTRACTOR may utilize existing neighborhood maps to assist in this process. Each neighborhood unit will, in the CONTRACTOR’S opinion, exhibit homogeneous characteristics.

Boundaries such as highways, natural, economic conditions, census tracts, and zoning etc. shall be considered. Each neighborhood unit will be assigned a separate identification code, which will be used for valuation. Each neighborhood code will be recorded and maintained on all property record cards and the computer database.

## **5.6** VALUATION OF REAL ESTATE

The CONTRACTOR will calculate a value estimate for each parcel that will be comprised of land, building, outbuildings, and total value. The final value shall reflect 70% of fair market value as of October 1, 2023. The CONTRACTOR shall compute to the nearest 50 dollars (\$50.00) the value of all properties identified above.

## **5.7** RESIDENTIAL PROPERTIES

The market approach is the preferred valuation methodology for parcels in the residential category. The CAMA system as installed for the Town will contain proven techniques for developing market-based estimates of value.

The CAMA System will present a summary of the cost approach for a subject and not less than 3 and up to 5 comparable sales, showing the basic inventory information for each. The comparable sales in the same market environment will not be merely similar properties but will be the three to five most comparable sales in the entire sales file. This determination will be made by calculating a weighted measure of comparability based on the relative importance of each characteristic (location, size, age, style, grade, & conditions, etc.). The sales, which most closely resemble the subject, will then be selected as comparable. Upon request from the ASSESSOR, the CONTRACTOR will provide the comparables used for any parcel.

Each individual selling price will then be adjusted to reflect differences in sales dates and physical characteristics to arrive at an adjusted selling price for each subject property.

The review appraiser can then choose this final market value estimate, the cost approach value or arrive at a separate value estimate based on the information available.

## **5.8** COMMERCIAL/INDUSTRIAL PROPERTIES

All new (built 2021-2023) commercial, industrial, public utility and special purpose buildings shall have an interior and exterior inspection, classified, priced, and reviewed as set forth in these specifications, the dimensions of all buildings shall also include the height, which shall be recorded on the property field card. Existing commercial, industrial, public utility and special purpose buildings prior to 2021 shall be classified, priced, and reviewed as set forth in these specifications, the dimensions of all buildings shall also include the height, which shall be recorded on the property field card

Income and expense data gathered by the TOWN shall be utilized and verified by the CONTRACTOR for income producing and where appropriate, owner-occupied properties. The CONTRACTOR, subject to the approval of the Assessor, will handle the analysis of this data.

Any income and expense data, including OPM form number M-58 with accompanying summary reports and rent schedules shall become property of the TOWN.

All information filed and furnished with the M-58 report shall not be a public record and is not subject to the provisions of Section 1-200 et seq. (Freedom of Information) of the Connecticut General Statutes. The CONTRACTOR will be responsible for any data entry of income and expense data. From these returns and other data sources, such as field investigations and interviews, the CONTRACTOR will establish market or economic rent and expenses for income producing properties.

The CONTRACTOR shall also develop capitalization rates reflective of the East Windsor market environment by investigating sales and income data. Rates shall be established for the various classes of property and checked with bankers, investors, and appraisers to ensure their accuracy. When the rates and methods have been checked by the ASSESSOR, the CONTRACTOR shall perform the income approach using both actual and economic income and expenses.

The CAMA System will give the appraiser the ability to model the marketplace by physical characteristics, construction type, and actual use for income producing properties and apply the results of the models to individual commercial or industrial properties. The models are used to assign appropriate market rent and expense information that is keyed to the location of the property, the effective age of the improvement, and the allocation of building space for potential or actual use.

The review appraiser will be provided with a single review document which provides information regarding the physical characteristics of the property, the indicated cost approach value, and one or more approaches to value that have already been adjusted to reflect the location, age, and condition of the subject property.

Each parcel will be valued by the CONTRACTOR's Senior Commercial Appraiser or appraiser with an MAI designation. The CONTRACTOR's Senior Commercial Appraiser or MAI designated appraiser and the ASSESSOR will conduct final valuation review. CONTRACTOR will provide upon submission of bid, a detailed plan on the Senior Commercial Appraiser or MAI involvement in the valuation of commercial properties.

## **6 BUILDING COST SCHEDULES**

### **6.1 GENERAL**

CONTRACTOR shall prepare for usage in the project as hereinafter specified, building cost schedules. These schedules will reflect the unit-in-place method based upon the square foot or cubic foot area of buildings as applicable. These schedules shall be used in computing the replacement cost in the TOWN for all residential, commercial, industrial, and farm construction. They shall reflect the wage scale for the various trades, labor efficiencies, overhead, profit, engineer and architect fees and all other direct and indirect costs of construction. Before final acceptance, they shall be proven by testing against known sales. All finalized schedules shall be approved by the ASSESSOR before adoption and usage by CONTRACTOR.

## **6.2** TYPES OF COST SCHEDULES

### **6.2.1** Residential

Residential cost schedules shall include schedules for various classifications, types, models, and story heights on a per square foot basis, normally associated with residential buildings. The schedule shall be flexible with special sections reflecting the various additions and deductions for construction components from the base specifications, along with prices for different types of heating systems, bathrooms, porches, breezeways, attached, detached, and basement garages, and finished basements and schedules for other building improvements usually found on residential property including, but not limited to, in-ground swimming pools, barns, sheds, tennis courts, gazebos, and hot tubs.

### **6.2.2** Commercial

Commercial building cost schedules shall be prepared in unit costs of material in place and charted on a per square foot basis and shall be prepared for various story heights and contain all the additions and deductions for construction components from base specifications.

### **6.2.3** Industrial and Special Structures

Cost schedules for industrial and special purpose structures shall be prepared in unit costs of material in place and charted on a per square foot basis and shall contain all the additions and deductions for construction components from base specifications.

### **6.2.4** Farm

Cost schedules for farm structures shall be prepared for square foot and cubic foot costs for various types of farm buildings including, but not limited to, barns, tobacco sheds, sheds, silos, milk houses, coops, etc.

Cost schedules for the aforementioned must be supported by a recognized valuation publication company such as Marshall and Swift, Means, etc.

## **6.3** DEPRECIATION SCHEDULES

Depreciation schedules or methods to be used in determining the amount of depreciation, shall reflect the normal and accepted depreciation rates of buildings according to classification. These schedules or methods shall cover residential, commercial, industrial, and farm buildings and shall be approved by the ASSESSOR.

## **6.4** SCHEDULE FOR TOWN

CONTRACTOR shall supply and leave for the TOWN not less than three (3) copies of all the above required building cost schedules and depreciation schedules for the TOWN 'S usage, one copy of which shall be turned over to the ASSESSOR upon approval of the schedules.

## **7 APPRAISAL SPECIFICATIONS**

### **7.1 APPRAISAL OF LAND**

CONTRACTOR shall appraise all land within the TOWN: including residential, vacant, commercial, industrial, agricultural, special use, public utility, and tax-exempt.

#### **7.1.2 LAND VALUE STUDY**

Land shall be valued on the basis of an analysis of all sales data occurring during the two-year period prior to October 1, 2023. The analysis and application of sales data shall be governed by procedures and techniques expressly approved by the ASSESSOR. CONTRACTOR shall make a careful investigation of this data and shall consult owners, realtors, banks, and other sources for information relative to sales of properties within the TOWN. All factors affecting the final values of land shall be considered, such as location, zoning, inland wetlands, topography, soil condition, utilities, size, vacancy, form of ownership, non-conforming uses, and zoning variances.

Non-conforming uses and zoning variances shall be considered in establishing values. A brief description of each lot or parcel of land, together with the valuation computations, shall be entered on the field record card.

#### **7.1.3 Land Value Inspection**

CONTRACTOR will make necessary adjustments in value to compensate for topographical irregularities such as high banks, steep slopes, swamps, irregular shapes, or anything else which may detract from the usefulness of the land. Non-conforming uses and zoning variances shall be considered in establishing values.

#### **7.1.4 Land Value Unit**

CONTRACTOR shall prepare land unit values by front foot, square foot, acreage, or fractional acreage; whichever in the judgment of CONTRACTOR and ASSESSOR most accurately reflects the market for the appraised land.

#### **7.1.5 Land Value Map**

CONTRACTOR shall delineate the land value units on all streets and acreage in the TOWN on a suitable map to be provided by the TOWN. The land value map shall be returned to the TOWN prior to the completion of the PROJECT.

#### **7.1.6 Neighborhood Delineation**

After consideration of the environmental, economic, and social characteristics of the TOWN, CONTRACTOR shall, with the cooperation and approval of the ASSESSOR, delineate "neighborhood" units within the TOWN. Each neighborhood unit will, in CONTRACTOR'S opinion, exhibit homogenous characteristics. Each neighborhood unit will be assigned a separate identification code, which will be used for valuation. These neighborhood codes shall be recorded and maintained on all property record cards and the computer database.

## **7.2 APPRAISAL OF RESIDENTIAL BUILDINGS AND STRUCTURES**

### **7.2.1 Physical Details**

CONTRACTOR shall make a careful and complete listing of physical construction details of all structures and all structural improvements appurtenant to real property in the TOWN, on proper forms as previously covered in these specifications.

### **7.2.2 Physical Inspections**

CONTRACTOR shall measure and inspect all sale properties to be utilized in the Sales Analysis and all open building permit properties. If COVID restrictions are still in place in the State, interior inspections will be waived.

CONTRACTOR will verify or correct the complete listing of all exterior physical details for all sale properties to be utilized in the Sales Analysis and open building permit properties. Contractor shall attempt to perform an interior inspection; if unsuccessful with entry the first attempt contractor will make a second attempt if no entry on second attempt contractor will need to send a call back letter to arrange taxpayer inspection appointments.

### **7.2.3 Exterior Field Review**

7.2.3a All properties shall be reviewed in the field by CONTRACTOR's personnel qualified as reviewers as previously prescribed in these specifications.

The properties shall be reviewed for classification, final value, and to assure that they are correlated to comparable properties. The ASSESSOR shall be notified of the dates of review and be entitled to accompany the reviewers during this phase of the revaluation.

7.2.3b Field Recording: Physical data and characteristics of the land parcel shall be observed in the field and recorded.

### **7.2.4 Pricing and Valuations**

Pricing and valuations of all land and buildings must reflect the present true and actual value as of October 1, 2023 and shall be done from and in accordance with the previously approved manuals and schedules.

The final valuation shall be the true and actual value of the structures plus the true and actual value of the land. In arriving at the true and actual value of the structures, replacement cost new less depreciation from all causes may be considered along with other factors affecting the value of the property, all of which shall be noted on the property record card.

## **7.3 APPRAISAL OF COMMERCIAL, INDUSTRIAL, PUBLIC UTILITY, AND SPECIAL PURPOSE PROPERTIES**

### **7.3.1 General**

All commercial, industrial, public utility and special purpose buildings shall be classified, priced, and reviewed in the same manner as residential properties, as set forth previously in these specifications.

### 7.3.2 Income Approach

Income and expense data gathered by the TOWN shall be utilized by CONTRACTOR for income producing and, where appropriate, owner-occupied properties. Any income and expense data with accompanying summary reports and rent schedules shall become property of the TOWN. All information filed and furnished with Income and Expense report shall not be a public record and is not subject to the provisions of Section 1-200 et seq. (Freedom of Information) of the Connecticut General Statutes. From these returns and other data sources, such as field investigations and interviews, CONTRACTOR will establish market or economic rent and expenses for income producing properties. CONTRACTOR shall also develop capitalization rates by investigating sales and income data. Rates shall be established for the various classes of property and checked by bankers, investors and appraisers to ensure their accuracy. When the rates and methods have been approved by the ASSESSOR, CONTRACTOR shall perform the income approach using both actual and economic income and expenses CONTRACTOR shall be responsible for entering all income data into the CAMA system.

### 7.3.3 Review

All final reviews and inspections shall be made in the same manner and for the same purpose as prescribed for residential properties. The reviewer shall be completely trained and fully experienced in the appraisal of the particular type and kind of commercial, industrial, public utility or special purpose building; the final value of which he or she is responsible.

## 7.4 CONTROL AND QUALITY CHECKS

### 7.4.1 Field Checks

The ASSESSOR shall spot check in the field, properties picked at random by her with or without the appropriate CONTRACTOR'S supervisor.

### 7.4.2 Building Permits

The ASSESSOR shall screen and make available on a timely basis to CONTRACTOR, copies of all building permits issued during the course of the revaluation to allow the inclusion of all new construction, additions, and remodeling in CONTRACTOR'S appraisals. Only new construction will have both exterior measuring and interior inspections.

CONTRACTOR shall provide a digital image of all such properties data collected as part of the valuation program, taken from a public way, reviewed for quality and attach the image into the proposed CAMA database.

### 7.4.3 Incomplete Construction

CONTRACTOR shall code as unfinished construction all property cards which appear to have incomplete improvements on the October 1, 2023 Grand List. The street card shall show the percentage of completion, based upon a schedule approved by the ASSESSOR, and reflect the percentage of completion in the valuation.

### 7.4.4 Sales Analysis

Sales analyses of properties shall be performed as a means of sustaining the values derived. These analyses shall be done on the aggregate of all residential properties and on each of the neighborhoods previously delineated. The sales analyses shall include, at a minimum, sales ratios and coefficients of variance and dispersion. Any additional requests for sales analyses by the ASSESSOR shall also be performed.

#### **7.5 PERFORMANCE BASED REVALUATION STANDARDS:**

All fair market values that are developed by the CONTRACTOR must meet the Performance Based Testing Standards developed by the State of Connecticut Office of Policy and Management in accordance with Section 12-62i of the Connecticut General Statutes.

### **8 RESPONSIBILITIES OF THE TOWN**

#### **8.1 Nature of Service**

It is clearly understood and agreed that the service rendered by CONTRACTOR are in the nature of assistance to the ASSESSOR and all decisions as to proper valuation shall rest with the ASSESSOR.

#### **8.2 Cooperation**

The ASSESSOR, TOWN, and its employees will cooperate with and render all reasonable assistance to CONTRACTOR and its employees.

#### **8.3 Items Furnished By the Town**

The TOWN shall furnish the following:

##### **8.3.1 Maps**

The TOWN shall furnish one (1) set of the most up-to-date TOWN Tax Maps that are currently available showing streets, and property lines and boundaries.

##### **8.3.2 Land Dimensions**

The TOWN will make available lot sizes and total acreage to CONTRACTOR of all pieces of property where the map or present records fail to disclose measurement or acreage.

##### **8.3.3 Zoning**

The TOWN will provide current TOWN zoning regulations and zoning maps.

##### **8.3.4 Existing Property Record Cards**

The TOWN will make available the present street cards.

##### **8.3.5 Property Transfers**

The TOWN shall notify CONTRACTOR, on a regular basis, of property splits and transfers occurring after the initial creation of the revaluation database by CONTRACTOR. CONTRACTOR shall the revaluation database as necessary.

#### 8.3.6 Building Permits

The TOWN shall make available copies of all building permits issued during the course of the revaluation project up to October 1, 2023.

#### 8.3.7 Signing of Communications

The TOWN shall sign, by the ASSESSOR or Assessor's designee, communications to be mailed at CONTRACTOR'S expense, for the purpose of contacting a property owner for inspection of the property.

#### 8.3.8 Mailing Address

The TOWN shall make available through the ASSESSOR'S Office the current mailing address and other relative data that exists on the administrative program for all property owners.

#### 8.3.9 Media

The TOWN shall have information above available for the purposes of creating a legal file on CONTRACTOR's computers during the initial stages of revaluation.

#### 8.3.10 Obligation to Keep Current

The TOWN shall continuously and currently update the information specified above.

#### 8.3.11 Sales Information

The TOWN shall continuously and currently provide copies of all sales information available to it with respect to transfer of parcels.

### **9 TRAINING:**

**9.1** Personnel: The Assessor shall determine the individuals and the amount of training each individual shall receive. If more than one person is receiving training at the same time, the training time shall be calculated as if one person is receiving training.

**9.2** Location: All training shall take place on the TOWN 'S computer hardware within the TOWN, unless both the TOWN and CONTRACTOR agree to an alternate training site or computer hardware.

### **10 TRANSMITTAL OF DELIVERABLES TO THE ASSESSOR**

#### **10.1** Records

Regular periodic delivery of appraisals and other information required under this agreement, as completed and in accordance with a schedule hereinabove set forth or agreeable to the ASSESSOR shall be made to the ASSESSOR for review. All appraisals of buildings either complete or under construction, shall be completed as of October 1, 2023. All completed and/or

corrected records shall be turned over to the ASSESSOR as of December 30, 2023. The final inspection and review shall take into consideration any known or apparent changes in the individual property since they were first inspected in order that the final appraisal of property shall be appraised as of October 1, 2023.

This information and/or appraisals and records shall not be made public until after the informal public hearings, except to the extent public access may be compulsory under provisions of applicable law.

It is understood and agreed that the Revaluation of properties covered by this contact shall meet or exceed the standards as outlined in the Connecticut Performance Based Revaluation Standards and Certification of Revaluation (Connecticut General Statutes sec. 12-62I-1 to 12-62I-7), shall be acceptable to the ASSESSOR and shall conform to the procedures and technical requirements of the ASSESSOR and, at least weekly, Contractor shall meet with said ASSESSOR to discuss the progress and various other details of the project.

TOWN OF EAST WINDSOR, CONNECTICUT

AFFIRMATIVE ACTION STATEMENT  
CERTIFICATION OF VENDOR

Concerning Equal Employment Opportunities and/or  
Affirmative Action Policy

The Vendor certifies that it:

- 1) Is in compliance with the equal opportunity clause as set forth in the Connecticut State Law.
- 2) Does not maintain segregated facilities.
- 3) Has filed required employer's information reports.
- 4) Lists job openings with State Employment Services.
- 5) It is in compliance with the American with Disabilities Act.

Check Appropriate One:

- Yes/Vendor certifies to having an Affirmative Action Program.  
 Not applicable/Vendor employs 10 or less people.

---

*Vendor-Company Name*

---

Date

---

Name & Title (Printed)

---

Signature

**TOWN OF EAST WINDSOR, CONNECTICUT**

**NON-COLLUSIVE STATEMENT**

Proposal for: **Computer Assisted Mass Appraisal Software**

The undersigned Vendor, having fully informed themselves regarding the accuracy of the statements made herein certifies that:

- a. The Proposal has been arrived at by the Vendor independently and has been submitted without collusion with, and without any agreement, understanding, or planned common course of action with any other vendor of materials, supplies, equipment or services described in the Invitation for bid designed to limit independent competition, and;
- b. The Vendor has not communicated the contents of the Proposal to its employees or agents to any person not an employee or agent of the Vendor or its surety on any bond furnished with the Proposal and will not be communicated to any such person prior to the official opening of the Proposal.

The undersigned Vendor further certifies that this statement is executed for the purpose of inducing the Town of East Windsor to consider the Proposal and make an award in accordance therewith.

Please complete & sign

Legal Name of Vendor	
Business Address	
Name & Title of Authorize agent	
Signature	
Date	
Phone # & Fax #	